



Section 3

PARTNER RECRUITMENT AND ACTIVATION

Enlisting partners can be a key component to a successful education and outreach campaign. By working together, you and your partners can achieve common goals that otherwise may not be accomplished alone.

Teaming up with individuals and groups in your area can help boost your capacity to educate eligible families about children's health insurance programs – particularly if your partners are considered trusted sources by your target audiences. Having a robust partner network increases your access to families within your area and expands your resources for providing support to those families who have questions and/or need assistance. In addition, new partners can provide fresh ideas and energy as they help you diversify and expand your outreach.

Partner networks are typically most helpful when they include a mix of organizations with varying levels of support to offer. Having this level of diversity should make it easier to get in touch with CHIP or Medicaid-eligible families – including those in hard-to-reach communities, those who have previously applied for programs and been denied, those who assume their income level makes them ineligible and those who are newly eligible due to recent program changes.

The following pages offer tips designed to help you identify, attract and retain partners. This is a guide – you may have existing relationships that do not require you to begin at step one. Select the combination of steps and order of implementation that makes the most sense for your unique situation.

3.1 Develop Goals for Engaging New Partners

Your organization is working to bring health insurance to every eligible child in your area. Partners can support this goal in a number of ways, from educating their constituents or networking with other organizations that come into contact with potentially eligible families, to talking about the issue in the media (see Section 4) or simply providing space for an enrollment event at no cost.

Before you engage partners, it's important to outline and prioritize your needs. Start by asking yourself and your colleagues, "What would we have liked to get done last year but weren't able to due to a lack of time, money or resources?" or "What did we do last year that would have been better if other organizations had participated?" Then ask yourself, "If we enlisted the help of a partner, could we complete those tasks this time around?"

Use the following list of questions to help brainstorm specific needs. Going through this exercise will help you identify concrete roles for partners to play, which in turn will help you select a manageable group of partners that you want to work with in the near term.

IDENTIFYING PARTNER CONTRIBUTIONS

Where/to whom do we need to distribute materials and reminders that may not currently be getting our information?
Are there organizations that could add authenticity, prestige and/or influence in reaching some of our target audiences?
Do we need additional support to successfully reach specific communities (Hispanics, African Americans, Asian Americans/Pacific Islanders, American Indians/Alaska Natives)?
Are there groups or individuals to whom we would like to be introduced?
Do we need a cadre of volunteers and/or dedicated staff with time to donate toward event staffing?
Do we need specific in-kind contributions?
Do we require space (e.g., board room, conference center, etc.) that someone could make available for events, meetings or activities?
Is there a technology, training or piece of equipment we need for a short-term project?

Once you have identified your needs, use the chart at the end of this section (see Sample A) to identify short-term versus long-term needs and list them in priority order.

Identify Potential Partners

Develop a list of potential partners by starting with organizations that have an existing connection to eligible families or a focus on children's health. Brainstorm organizations that serve your area but may fall outside of those key categories. Consider partners who have contact with both traditionally hard-to-reach families and children as well as the newly-eligible. Use this list to help get you started.

- Successful partners from previous enrollment and outreach efforts
- Current partners that you work with on other programs
- Local chapters or affiliates of national organizations
- Social service organizations
- Other State and local Government officials
- Media organizations with deep community involvement (including ethnic and cultural community papers)
- Ethnic, cultural and community development organizations
- Health advocates
- Health providers and organizations
- School counselors and social workers
- School principals and superintendents
- School nurses and coaches
- Universities and ESL course providers
- Community centers
- Utility providers
- Hospital emergency rooms and health clinics
- Local businesses
- Ethnic grocery stores
- Tenant associations
- Public libraries
- Head Start programs
- Pre-kindergarten programs and child care centers
- Cooperative extension programs
- Local 311 information centers
- Community health centers



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- Groups that provide direct health services, especially to parents and guardians
- Faith communities and faith-based organizations
- Community, family and corporate foundations
- Judges, family court attorneys and *pro bono* attorneys

Once you have a list of organizations, match the list of potential partners to the list of needs you developed. You will not have time or capacity to work with everyone, so consider which potential partners are best organized and those that are best positioned to reach the largest number of families in your target audience. Not every organization you identify will be able to support your efforts, so list more than one potential partner for each need.

Virginia's FAMIS Back-to-School Push

Virginia's Family Access to Medical Insurance Security (FAMIS) program partnered with the Virginia Department of Education to host its 8th Annual Back-to-School Campaign in 2009. This partnership provided FAMIS with access to more than 900 schools statewide, where it distributed more than 500,000 back-to-school flyers to be shared with students during their first week of school. FAMIS also took advantage of an existing mailing opportunity by sending inserts to each school division to distribute along with acceptance letters for the Free and Reduced Price School Lunch Program. Since parents were waiting to receive these letters, the FAMIS insert was likely read by many more parents than it would have been if sent separately.

FAMIS also created a drop-in article with the catchy title "Get it, Use it, Keep it!" and encouraged schools, parent-teacher associations, youth organizations, faith-based organizations and local media to help spread the word about children's health insurance by including the article in their publications or as a separate handout. FAMIS made it easy to access materials; schools that needed additional materials could simply print them out directly from the FAMIS Web site or order free bulk quantities in English and Spanish by phone or fax. By partnering with the Department of Education, FAMIS was able to leverage its outreach capacity and move one step closer to making its goal of "covering children with affordable health insurance" a reality.

Source: www.famis.org/backtoschool.cfm

Engage Potential Partners

Whether you are reaching out to a new potential partner or reconnecting with one in your existing network, below are some general guidelines for approaching and engaging partners:

Make Contact

Engaging potential partners begins by simply making contact. Schedule a meeting and/or conference call with representatives from the organization to talk about ways you can work together to help educate the community about children's health insurance, invite them to attend a relevant meeting or event you are hosting, or bring CHIP and/or Medicaid materials and a sample partnership agreement letter (see Sample B) to a conference you might both be attending. Think about potential ambassadors who can



come with you to a meeting or help secure a meeting and lend influence, including board members, local officials who are champions of your effort or existing partners. They can often help get partnerships up and running more quickly and efficiently attending a meeting or making a call on your organization's behalf.

Establish Goals and Objectives

In your initial conversation, identify your organizational mission and highlight examples of work you have completed in the past. Offer suggestions on how you think the potential partner organization may be able to assist you as well as benefit in turn from a relationship. As you determine ways partners can help your organization increase enrollment in children's health insurance programs, also consider what assistance you can offer them to help reach their respective goals and objectives.

Share Resources

A true partnership flows both ways, so make it a point to offer your partners resources that they will find valuable. A local business may simply be looking for a community effort to support, a student group may need to fill required community service hours or a church may recognize there is a demand for enrollment information in their community and consider it little additional effort to incorporate the issue in a faith service or include information in a church newsletter or bulletin. Begin your initial conversations with potential partners by recognizing their potential contributions and offering to support them in return.

Work Collaboratively

Finally, be open to suggestions. While it is helpful to approach an organization with a specific request, potential partners often have their own ideas on how they can contribute. They may also look to you for other suggestions if they do not feel they can offer the type of support you requested. Keep a list of additional support activities, like the sample list provided under "Activate Partners."

Formalize Partnerships

Encourage potential partner organizations to sign an agreement letter (see Sample B) for you both to keep on file. Formalizing the relationship typically deepens the commitment level on both sides. The partnership agreement letter is a helpful tool to e-mail to potential partners or distribute at events and meetings. If you have a public Web site, newsletter or other form of outward communication, use those tools to recognize partners who are willing to formally commit their support.

Activate Partners

Once you have come to an agreement with a partner, make it as easy as possible to work with you. If you equip your partners with what they need upfront and make the working experience enjoyable and results-oriented, your partner network will likely continue to grow and become increasingly self-sufficient.



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Partners who are engaged often want to stay engaged and may look for other opportunities to support your efforts. Maintain a list of potential outreach activities that will help you saturate your community with children's health insurance information. Since potential partners can range from a grocery store to a faith-based organization, choose two or three activities from the menu below and tailor them for your prospective partners depending on organizations' strengths and levels of time commitment.

POTENTIAL ACTIVITIES & ASSOCIATED TIME COMMITMENT

Minimal Planning Involved	Some Planning Involved	Significant Planning Involved
<ul style="list-style-type: none">• Post children's health insurance information and links on your organization's Web site and community Web sites	<ul style="list-style-type: none">• Highlight children's health insurance information in local publications, community listservs, school or faith e-newsletters, etc.	<ul style="list-style-type: none">• Host education and enrollment events in your community
<ul style="list-style-type: none">• Post information in high-visibility areas like bulletin boards, countertops, bathroom doors and stalls	<ul style="list-style-type: none">• Include children's health insurance focused media outreach as part of your organization's overall outreach plan	<ul style="list-style-type: none">• Provide a high-visibility opportunity for your organization to talk about children's health insurance (e.g., drafting an opinion piece, appearing on a panel, giving remarks at a news conference)
<ul style="list-style-type: none">• Add children's health insurance information to e-mail signatures in outgoing external e-mails	<ul style="list-style-type: none">• Use PSA scripts to record "on hold" messages on telephone or intercom systems	<ul style="list-style-type: none">• Conduct training for members and staff to assist with enrollment
<ul style="list-style-type: none">• Disseminate information to target audiences through your organization's previously scheduled communications, such as action alerts and direct mailings	<ul style="list-style-type: none">• Incorporate children's health insurance messages, materials and/or speakers into planned events – PTA meetings, community workshops, health fairs, festivals and education events	<ul style="list-style-type: none">• Engage multiple partners, including a media partner, to hold a telethon or radio-telethon to enroll eligible but uninsured kids

Rhode Island KIDS COUNT Story Bank

Rhode Island KIDS COUNT, an organization that works to improve the health, safety and education of Rhode Island's children, created a Story Bank Project to gather stories from families about their experience related to children's health insurance. The organization requested stories from parents and guardians describing how RIte Care helped their children stay healthy, as well as the impact on families who lost children's health care coverage. The stories are designed to be shared with key leaders, partners and media to demonstrate how critical health care is for families in Rhode Island.

Source: www.rikidscount.org/matriarch/documents/Storybank%20Project%20description.pdf

Retain Partners

It is important for each partner to remain active and involved. You can maintain interest and enthusiasm by keeping partners informed and engaged in all program activities. Active partners will develop a sense of identity and satisfaction when they are included in productive campaign activities and see the fruits of their labor.

To encourage partners to stay active, try the following:

PARTNERSHIP MANAGEMENT TOOLS	
Communicate Regularly	<ul style="list-style-type: none"> • Stay in touch with partners via regular e-mails, check-in phone calls, monthly or quarterly updates/e-newsletters. • Send partners time-sensitive program alerts quickly. • Actively request partner feedback. Ask them what additional resources they might need. • Create a listserv for your partner network. • Provide partners with easy access to basic children's health insurance information (e.g., a phone numbers for inquiries about benefits, a general e-mail address, a dedicated Web site, fact sheets).
Offer Personal and Group Recognition	<ul style="list-style-type: none"> • Send partners a formal thank you letter after establishing the partnership (see Sample C). • Celebrate the smallest of successes by sending an e-mail or putting in a phone call recognizing your partner's contribution. • Send out photos from partner events or quotes from families they helped enroll to recognize their hard work. • Dedicate a section of an existing e-communication or newsletter to highlight and thank a select number of partners for their hard work/contributions.
Encourage Networking and Collaboration	<ul style="list-style-type: none"> • Create a contact list for partners and encourage them to communicate among themselves outside of scheduled activities. • Create a listserv to send items out quickly. • Establish ways to recognize and share partners' best practices through your communication channels. • Provide an opportunity for them to socialize with each other, to "brag" about the work they've done to help get kids enrolled and to provide gentle, healthy peer pressure and competition.

Stay Organized and Be Sensitive to Partners' Time	<ul style="list-style-type: none"> • Designate someone on your team for partners to contact with questions, feedback and issues. • Develop a process by which partners can report problems or general concerns and address these issues in a timely manner. • Respect partners' time and resources by realistically estimating the time tasks will take, beginning and ending meetings on schedule and sticking to your agenda. • Distribute labor to avoid "burn out" . . . do not always rely on the same partners. • Draw a line between engaging partners and including them on every e-mail and "bugging" them. Include them on program update communications and e-mails applicable to their organization. • Minimize the amount of work that activities require of a partner. Ensure that they have tools such as templates, full details and points of contact. • Make it easy for partners to increase or decrease their level of commitment.
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Track and Re-evaluate Partners

To easily monitor your partners' activities, develop a tracker that will not only provide a snapshot of outreach efforts but will also be useful for identifying busy periods and spotting partners that may be interested in increasing their level of involvement or at risk of "burning out." Useful information to track includes: organization name and contact details, population reached, type of outreach/activity, date of activity, location of activity and estimated number of people reached. You may also find it helpful to develop a separate tracker for outreach to potential partners. This tracker could be as basic as listing potential partners and your contacts with them to date. After each contact with a potential partner, update the tracker with a summary of the conversation and next steps.



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3.2 Sample Materials

Sample A – Target Organizations for Partner Recruitment Grid

	Organizational Need	Potential Partner Organization(s)	Action Plan for Partner Recruitment	Status	Comments
Short-Term					
Short-Term					
Short-Term					
Long-Term					
Long-Term					
Long-Term					

Sample B – Partnership Agreement Letter

[INSERT DATE]

Dear [INSERT NAME]:

[INSERT NAME OF PARTNER ORGANIZATION] is pleased to partner with [INSERT NAME OF YOUR CAMPAIGN] to help get our children in [NAME OF YOUR STATE] enrolled in health insurance programs through outreach, education and recruitment efforts. By joining the network of partners dedicated to this issue, [INSERT NAME OF PARTNER ORGANIZATION] pledges to work in conjunction with [INSERT NAME OF YOUR CAMPAIGN] to inform our constituents about children's health insurance programs available in our area. This collaboration is particularly important to our organization because we serve the populations that are in need of accurate and trusted information about children's health insurance.

We understand that before children can be (re)enrolled, families must first understand whether they qualify. That is why it is so important to raise awareness about children's health insurance programs – many eligible parents, guardians and caregivers do not realize that their children are eligible.

As an official partner, we will identify efforts to disseminate information about children's health insurance programs to our constituents. In support of these efforts, we agree to [BE SURE TO CUSTOMIZE THIS SECTION FOR EACH PARTNER]:

- Participate in meetings and/or trainings related to children's health insurance programs
- Disseminate enrollment materials and timely information about children's health insurance programs to [INSERT NAME OF PARTNER ORGANIZATION] staff, members, constituents and supporters
- Send e-alerts to [INSERT NAME OF ORGANIZATION] constituents about important dates related to enrollment in children's health insurance programs
- Link to the [INSERT NAME OF YOUR CAMPAIGN] Web site from our site
- Publish an article bylined by a [INSERT NAME OF YOUR CAMPAIGN] official in our publications
- Conduct on-the-ground, direct outreach to our constituents and assist them with enrollment
- Promote children's health insurance programs at events and activities
- Authorize the inclusion of [INSERT NAME OF PARTNER ORGANIZATION]'s name in [INSERT NAME OF YOUR CAMPAIGN]'s listing of official partners

We look forward to working collaboratively with [INSERT NAME OF YOUR CAMPAIGN] on additional efforts to ensure that as many eligible children as possible are enrolled in children's health insurance programs. By joining forces with this network, [INSERT NAME OF PARTNER ORGANIZATION] will proudly lend a vital voice to this issue so that our constituents and their families are one step closer to having the health care they need.

Signed: _____



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Printed Name: _____

Title: _____

Name of Organization: _____

Address: _____

Phone: _____

E-mail: _____



Sample C – Thank You Letter

[DATE]

[NAME OF RECIPIENT]

[TITLE]

[ORGANIZATION]

[ADDRESS]

Dear [NAME OF RECIPIENT],

Thank you for joining the network of partners dedicated to supporting outreach, education and recruitment efforts to increase enrollment in children's health insurance programs. Your support and dedication as a key member of the local community will help ensure that local children and families are one step closer to having the health care they need.

As you know, many parents, guardians and caregivers do not realize that their families meet the eligibility requirements to enroll their kids in local children's health insurance programs. That is why your willingness to educate your constituents about this issue is so vitally important. Working together, we look toward a future where all children in our community are receiving the care that they need – in large part because their families clearly understand the health options available to them.

We appreciate your ongoing commitment to ensuring as many eligible children as possible are enrolled in local children's health insurance programs and commend you for your leadership and willingness to lend your voice to this issue.

Sincerely,

[INSERT NAME OF SENDER]

[INSERT SENDER'S ORGANIZATION'S NAME]